



# School Nurse

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## Desk Guide

October 2021



# Overview



Lightbulb icons are displayed throughout the **CT WiZ School Nurses Desk Guide** to indicate helpful tips.

This manual provides CT School Nurses instructions on how to request **CT WiZ** user access, load a student roster into **CT WiZ** so that your students are grouped under your school, and run reports, including a report to verify student COVID-19 vaccination status.

To navigate this manual quickly and easily, utilize the **Interactive Table of Contents** located on the following page. Click on the specific topic to navigate directly to the appropriate page within the document.

Google Chrome, Microsoft Edge and Mozilla Firefox are the recommended web browsers when using **CT WiZ**.



**Per CT WiZ regulations and the DPH confidentiality agreement, you may only access records in CT WiZ for students attending your school.** [Immunization Laws and Regulations \(ct.gov\)](#)

Privacy of all **CT WiZ** records must be protected at all times. Student records downloaded from **CT WiZ** must be maintained in a private and secure system.

## CT WiZ Support

- Visit [All About CT WiZ](#) for quick links to training materials and technical support.
- Need additional support? Submit a request to our [CT WiZ Helpdesk](#).

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# Requesting CT WiZ User Access

## School Nurse Overview

The school nurse uploading student rosters, running school reports and accessing the **Education** module will require a username and password to access **CT WiZ**. Each user account must be associated with the appropriate School District/School and must be given access to the **Reports** module, **Education** module and the **School Nurse Report Category**. After you login to **CT WiZ**, the home page will show which School/School District you are associated with.

Note: If you are a School-Based Health Center (SBHC), you have full Clinic Access permissions and can visit [CT WiZ Training](#) for full clinic training resources. If you already have Clinic Access as a SBHC and are also a school nurse and want access to the Education module added to your permissions, submit a [helpdesk ticket](#).

## CT WiZ Account Registration Request



If you are already a registered user in CT WiZ but need to update the school(s) you are associated with, submit a request to the helpdesk to update your information. You do not need to register for another user account.

### Follow these steps:

**Step 1.** - Go to <https://ctwiz.dph.ct.gov/ctwiz/Login.aspx>

**Step 2.** - Click **Request User Account** hyperlink.



All fields with an asterisk (\*) are required.

**Step 3.** - Complete the **Contact** section with your information.

**Step 4.** - Choose **School Read Only** from the **Access Requested** drop-down.

**Step 5.** - In the **Organization Name**, type in the name of the school you work with. If you work with more than one school, then type in the names of the schools separated by a comma.

**Step 6.** - Choose **School** from the Type drop down.

**Step 7.** - Complete the Organization information with your school's information.



Note: If you are a school nurse at a school-based health center administering immunizations to students, you can request full Clinic Access. See [Which User Access Do I Need?](#) to ensure you request the correct access type.

**Step 8.** - In the **Documents** section click **Review**.



The **CT WiZ User Agreement** will pop up in a new window.

**Step 9.** - Read the agreement and close the window.

**Step 10.** - In the **Documents** section, click on **Click to Accept**.

**Step 11.** - In the **Validation** section, Click the check box next to **I'm not a robot**.

**Step 12.** - Click **Submit Registration**.



**Step 13.** - On the **Registration Complete Confirmation** pop-up click **OK**.

You will be returned to the **Log In** page.

## Initial Log In

After your registration request is complete, you will receive two emails. The first one will include your Username and the second one will include a temporary password. These emails may sometimes be directed to your spam/junk folder.

**Follow these steps:**

**Step 1.** - Go to <https://ctwiz.dph.ct.gov/ctwiz/Login.aspx>

	<p><b>Username and Password:</b></p> <ul style="list-style-type: none"> <li>• You will receive two separate emails with your username and temporary password</li> <li>• Check your spam or junk email folders if you do not receive emails within two (2) business days <ul style="list-style-type: none"> <li>○ If you do not receive the emails, do not register again. Submit a request to our helpdesk</li> </ul> </li> <li>• Copy your username and temporary password from the emails and paste into CT WiZ for first login</li> </ul>
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**Step 2.** - Enter the username you received in your email.

**Step 3.** - Enter the temporary password received in your email.

**Step 4.** - Create a password and enter it into the **New Password** and **Confirm New Password** fields.

	<p>Your password must contain:</p> <ul style="list-style-type: none"> <li>• A minimum of nine characters</li> <li>• A combination of upper- and lower-case letters</li> <li>• At least one special character (Ex. #, %, *, ! \$)</li> </ul> <p>Passwords must be changed a minimum of 6 times before reuse.</p>
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**Step 5.** - Click **Update** in the upper right corner of the page.

**Step 6.** - The **Password Questions** page appears.

**Step 7.** - Answer each of the questions.

	<p>Answering these questions will allow you to reset your password without contacting DPH. It is suggested that you keep a record of your answers to these questions.</p>
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**Step 8.** - Click on **Update** on the top right of the page.

## Enrolling and Unenrolling Student(s) in School/School District

### Overview

Student rosters can be uploaded, or students can be manually enrolled to a School/School District in **CT WiZ**. To upload a student roster or manually enroll a student, you must be a **CT WiZ** user and associated to at least one School/School District in **CT WiZ**. Once a student roster is uploaded, records in **CT WiZ**

will be matched with the students uploaded from the roster to enroll them into your School/School District. **CT WiZ** users are only able to import, view files and run reports for the School/School District they are associated with.

	Students can be enrolled in multiple School/School Districts concurrently. If a student is currently enrolled in a School/School District, the student will NOT be automatically unenrolled when a new school enrollment is added. For example, when they change schools from Middle School to High School. Please ensure to manually unenroll students from their previous enrollments to ensure school rosters remain up-to-date.
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## Upload from a CSV File

Follow these steps:

**Step 1.** - In the left-hand menu, click **Reports**.

**Step 2.** - Click **School Roster File Import** from the **School Nurse** menu.

The school district and school fields will auto populate. If you are associated with more than one **School/School District**, then you can choose the enrolling **School/School District** from the drop-down menu.

**Step 3.** - Click **Add New Upload File**.

**Step 4.** - Click **Choose File** to upload a file. File must be a **CSV UTF-8 (Comma delimited) (.csv)** or **Text (.txt)** file in a specific format. See below helpful tip. File name cannot be longer than 80 characters.

**Step 5.** - If using the template or a file that has a header then check the box indicating the **File includes Header on First Row**.

**Step 6.** - Enter a file description if needed.

**Step 7.** - Click **Create**.

	Please use the latest version of the <b>Student Roster Upload Template</b> , click <a href="#">Student Roster Upload Template</a> to access when importing student rosters. Please follow the below instructions.
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- **Do not change** any formatting or headers in the bulk upload template.
- All columns with \* are **mandatory fields** (e.g. First Name\*).
- **CT WiZ** will search for **exact matches** and will create an error for fields that do not match. Therefore, columns not marked as mandatory **should** be left **empty**.
- Save as file type: **CSV UTF-8 (Comma delimited) (.csv)** file before uploading.
- Record count cannot exceed 50,000 students. Limit can be modified by breaking the records in separate import files.

	File uploads run overnight.
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# View File Imports

Follow these steps:

- Step 1.** - In the left-hand menu, click **Reports**.
- Step 2.** - Click **School Roster File Import** from the **School Nurse** menu.

The school district and school fields will auto populate. If you are associated with more than one **School/School District**, then you can choose the enrolling School/School District from the drop-down menu.

- Step 3.** - Search criteria can be entered to filter results.
- Step 4.** - Click **Search**.

**School Roster File Import**

Enter the selection criteria and click the "Search" button or click the "Add New Upload File" to add new files. Add New Upload File i

**View**

**School District \***  
DISTRICT

**School \***  
SCHOOL

**File Uploaded Date Range**      **File Processed Date Range**  
From: MM/DD/YYYY Through: MM/DD/YYYY      From: MM/DD/YYYY Through: MM/DD/YYYY

Status  
(ALL)

Show only files with errors

Previous Criteria      Clear      **Search**      Cancel

The search results portion of this page displays all queries/file imports that have been uploaded into the import staging table. If a file has been processed (overnight), the **Date/Time Processed** column will display the date and time of when the file was processed. The **Processed Records**, **Total Errors** and **Total Warnings** columns will show the number of records in each.

## Reviewing Results

**Processed Records** is the data for students who were successfully loaded into **CT WiZ**. **Error Messages** shows records of error or warnings that were generated as part of the import process. Records with errors will not be matched with your school; therefore, these students will not appear on reports run for your school. Records with warnings will be matched with your school; however, steps should be followed to correct this warning.

## View the Processed files

Follow these steps:

**Step 1.** - From the **View File Imports Search** results, click **View** next to the upload you would like to view.

District	School	File Description	Filename	DateTime Uploaded	DateTime Processed	Processed Records	Total Errors	Total Warnings	
		SCHOOL ROSTER	roster.csv	7/20/2021 3:08:53 PM	7/20/2021 8:30:04 PM	0	2	0	View
		UPLOAD 7/28/2021	roster-test.csv	7/28/2021 2:19:14 PM					View

**Step 2.** - Click **View Processed**.

Processed File Name	Processed Records	Total Errors	Total Warnings
ROSTER-TEST_RESULTS.TXT	0	2	0

A **Text (.txt)** file will be downloaded.

## View the Error and Warning Messages

Follow these steps:

**Step 1.** - From the **View File Imports Search** results, click **View** next to the upload you would like to view.

**Step 2.** - Click **View Error Messages**.

A **Text (.txt)** file will be downloaded.

## Common Errors and Warnings:

### “Student Is Missing IZ Program” (Error)

This indicates that the student has opted out of **CT WiZ**. Parents/Guardians of students under the age of 18 can opt students into **CT WiZ**. Student’s 18 and older can opt themselves into **CT WiZ**. For the process to opt back into CT WiZ, visit: [ALL ABOUT CT WiZ](#)

### “Gender Does Not Match” (Error)

This indicates that the gender in the .csv file upload does not match the gender listed in CT WiZ.

#### Follow these steps to correct:

- Step 1.** - Verify the information on the .csv file. If the information on the .csv file is not correct, then edit the information in the .csv file. If the information in **CT WiZ** is not correct, then follow the steps to edit a student record in **CT WiZ**.
- Step 2.** - Once edits are made to either the .csv file or the record in **CT WiZ**, the .csv file can be uploaded again, or the student could be manually enrolled.

### “No Student Match Found” (Error)

This indicates that a record for the student was not found in **CT WiZ**. The name, date of birth and gender must be an exact match. Follow the steps to search for a student record. If no student record is found in **CT WiZ** then it may indicate that the student moved from another state or has not received vaccinations in the State of Connecticut. If the student record is found in **CT WiZ** then match the record in **CT WiZ** with the student’s information on the .csv upload file.

#### Follow these steps to correct:

- Step 1.** - Verify the information on the .csv file. If the information on the .csv file is not correct, then edit the information in the .csv file. If the information in **CT WiZ** is not correct, then follow the steps to edit a student record in **CT WiZ**.
- Step 2.** - Once edits are made to either the .csv file or the record in **CT WiZ**, the .csv file can be uploaded again, or the student could be manually enrolled.

### “Invalid Grade Level” (Warning)

This is a warning that indicates that the grade level for this student, indicated on the upload roster is not a valid grade level in **CT WiZ**. Valid grade levels are DC (daycare), PK, K, and grades 1 through 12.

#### Follow these steps to correct via .csv upload:

- Step 1.** - Edit the **Grade Level** on the .csv file.
- Step 2.** - Upload the .csv file with the edited information.

#### Follow these steps to correct manually:

- Step 1.** - Follow the steps to edit a student record in **CT WiZ**.

## Unenrolling Multiple Students

#### Follow these steps:

- Step 1.** - In the left-hand menu, click **Reports**.
- Step 2.** - Click **School Unenrollment** from the **School Nurse** menu.

The school district and school fields will auto populate. If you are associated with more than one **School/School District**, then you can choose the enrolling **School/School District** from the drop-down menu.

**Step 3.** - Select the **Grade** of the students to unenroll.

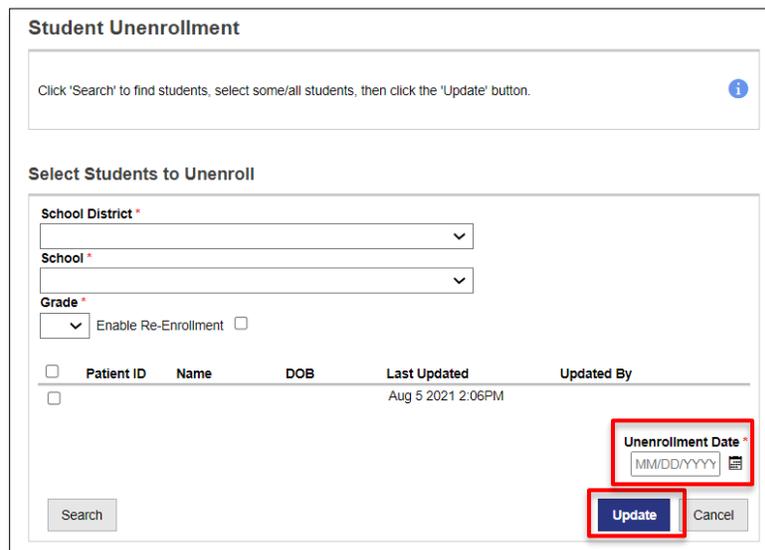
**Step 4.** - Click **Search**.

**Step 5.** - Select students to unenroll by checking the box next to their **Student ID**.

 Clicking the checkbox next to **Student ID** will select all students. You will then be able to click on checks next to a student's Student ID to remove check marks for students that should not be unenrolled.

**Step 6.** - Enter the **Unenrollment Date**.

**Step 7.** - Click **Update**.



**Student Unenrollment**

Click 'Search' to find students, select some/all students, then click the 'Update' button. ⓘ

**Select Students to Unenroll**

**School District \***

**School \***

**Grade \***   Enable Re-Enrollment

<input type="checkbox"/>	Patient ID	Name	DOB	Last Updated	Updated By
<input type="checkbox"/>				Aug 5 2021 2:06PM	

**Unenrollment Date \***  ⓘ

## Manual Enrollment

Purpose: To enroll an individual student outside of your roster process (for example a student transferred to your school mid-year).

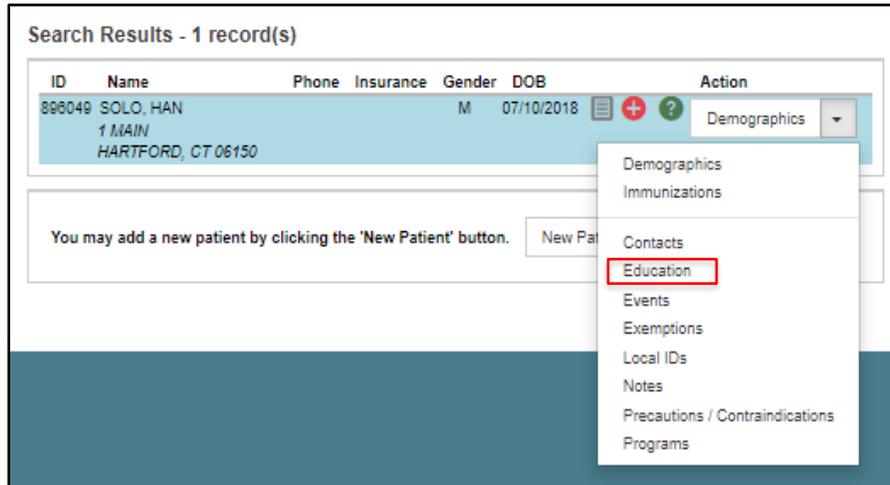
**Follow these steps:**

**Step 1.** - In the left-hand menu, click **Students** then **Search** to search for a student.

**Step 2.** - Enter as few as the first two letters of the student's last name and first name. Entering the date of birth will narrow search results. Then click **Search**.

 An error message will appear if the record count exceeds the system limit of 25 records. Adding search criteria will help to limit the search results.

**Step 3.** - Select **Education** from the **Action** drop-down menu to the right of the student's name.



**Step 4.** - On the **Education** page, click **Add School Enrollment**.

The school district and school fields will auto populate. If you are associated with more than one **School/School District**, then you can choose the enrolling **School/School District** from the drop-down menu.

**Step 5.** - Enter the date of enrollment in the **Enrollment Date** box. Complete additional fields if the information is available.

**Step 6.** - Click **Create**.

## Manual Student Unenrollment

Purpose: To unenroll an individual student outside of your roster process (for example a student left your school mid-year).

**Follow these steps:**

**Step 1.** - Follow the steps to **Search for a Student Record**

**Step 2.** - Select **Education** from the **Action** drop-down menu to the right of the student's name.

**Step 3.** - Enter the **Unenrolled Date**.

**Step 4.** - Click **Update**.

## Student Records



Per CT WiZ regulations and the DPH confidentiality agreement, you may only access records in CT WiZ for students attending your school. [Immunization Laws and Regulations \(ct.gov\)](#)

## Search for Student Record

### Follow these steps:

- Step 1.** - In the left-hand menu, click **Patients** then **Search** to search for a student.
- Step 2.** - You must specify either the **Patient ID** or two of the following:
- DOB
  - At least two letters of the first name
  - At least two letters of the last name

Then click **Search**. **Search Results** for all students meeting the criteria entered will appear on the bottom of the page



An error message will appear if the record count exceeds the system limit of 25 records. Adding search criteria will help to limit the search results.

## Editing a Students Record

### Follow these steps:

- Step 1.** - Follow the steps to **Search for a Student's Record**.
- Step 2.** - Select and click **Demographics** from the **Action** drop-down menu to the right of the student's name.

The **Student Demographics** page will appear.

- Step 3.** - Make required edits to student's **Demographics**.
- Step 4.** - Click **Update**.

## View Precautions/Contraindications

### Follow these steps:

- Step 1.** - Follow the steps to search for a student's record.
- Step 2.** - Select **Precautions/Contraindications** from the **Action** drop-down menu to the right of the student's name.

The **Student Precautions/Contraindications** page will appear.

- Step 3.** - Click **View** to view the specific **Precautions/Contraindication**.

Patient Precautions / Contra... [Learn More](#) [Add Precautions / Contraindications](#)

**View**

Precautions / Contraindications	Effective Date	Expiration Date	Comments
Allergy to eggs	08/06/2021		<a href="#">View</a>

 If a student has any Precautions/Contraindications, a red icon stating **Precautions/Contraindications ARE specified**, will be visible at the top any student pages for this student.

## Print Official Immunization Record

Follow these steps:

- Step 1.** - Follow the steps to search for a student's record.
- Step 2.** - Select **Immunizations** from the **Action** drop-down menu to the right of the student's name.

The **Immunizations** home page will appear.

- Step 3.** - Click the **Links** dropdown on the top right of the page.
- Step 4.** - Click **Official Immunization Record**.

Immunizations Home [Learn More](#) [Links](#)

**View**

 **Precautions / Contraindications ARE specified**

DOB	Age	History of Varicella?	Da

- Official Immunization Record
- Administrative Record
- Patient Events
- ACIP Adult Immunization Schedule
- ACIP Child and Adolescent Immunization Schedule
- Edit Vaccine Defaults

## Reports

### Reports Overview

The reports section of this guide includes information on the purpose of the report, steps to run the report and the results generated from each report.

Each report has an additional information  icon. Click on this icon to review additional information regarding the report.



Some internet browsers may cause Excel and PDF reports generated in **CT WiZ** to download rather than display. If a report does not display, check the bottom of your screen for the downloaded file.



Per CT WiZ regulations and the DPH confidentiality agreement, you may only access records in CT WiZ for students attending your school. [Immunization Laws and Regulations \(ct.gov\)](#)  
Privacy of all CT WiZ records must be protected at all times. Student records downloaded from CT WiZ must be maintained in a private and secure system.



If the report is too large to process, it may time out before processing is complete. Report filters can be used to limit the report output to specific criteria, this will also reduce processing time.

Limiting the vaccination date range or restricting the report to a certain grade range can significantly improve the processing time needed to produce the report.

Some reports are required to be run overnight due to their size and complexity. **CT WiZ** will automatically schedule these reports to run during off-peak hours.

## Reports Location

Click on **Reports** from the left-hand navigation menu in **CT WiZ**. Reports are in the **School Nurse** section. Click on the name of the report to open.

The screenshot shows the CT WiZ interface. On the left is a navigation menu with 'Reports' highlighted in red. The main content area is titled 'Reports' and contains several sections: 'Patient' (Batch Patient Administrative Record, IZ History/Risk/Recommendations, Official Immunization Record, Patient Administrative Record, Patient Cohorts), 'Forms / Informational Documents' (ACIP Child and Adolescent Immunization Schedule, ACIP Adult Immunization Schedule, Clinic Contact Listing, Product Listing, Vaccine Information Statements (VIS)), 'CT Forms and Resources' (Training Materials, Technical Support, Application Help), and 'School Nurse' (highlighted in red). The 'School Nurse' section lists various reports including Immunization Rates (School Version), Patient Reminder/Recall (School Version), Patients with Notes, School Roster File Import, Student Grade Advancement, Student Roster, Student Unenrollment, Students with Active Exemptions, and Patients with Precautions / Contraindications.

# Immunization Rates (School Version)

## Purpose

The **Immunization Rates** report is used to determine the number and percentage of students in your school that have/have not received the appropriate number of doses of all indicated antigens. The report also shows the number and percentage of students that have met each of the individual vaccine groups as specified in the report criteria. The **Appropriate Statistics Summary Report** provides statistical information for students meeting (or not meeting) the indicated vaccine series. This is an aggregate, anonymous report. The **Students Not Properly Immunized Detail Report** provides a listing of all students who do not meet the indicated vaccine series, as well as which immunizations they are missing. For example, you may use this report if you need to determine the overall and/or COVID-19 vaccination rates of the students in your school and a listing of those students who are not fully vaccinated.



Example: If the **COVID-19 series** is selected, all students who have/have not received the appropriate number of doses are included in the rate report.

Reminder: Only students who are [enrolled in CT WiZ](#) and who have matched in your roster upload will be included in this report.

## Run the Immunization Rates Report:

Follow these steps:

**Step 1.** - In the left-hand menu, click **Reports**.

**Step 2.** - Click **Immunization Rates (School Version)** from the **School Nurse** menu.

The school district and school fields will auto populate. If you are associated with more than one **School/School District**, then you can choose the enrolling **School/School District** from the drop-down menu.

**Step 3.** - Choose **Appropriate Statistics Summary** or **Students Not Properly Immunized Detail**.

**Step 4.** - Select a predefined vaccine series from the **Vaccine Series Dose Presets** drop-down or run a custom report by entering numeric values in the vaccination text boxes.

**Step 5.** - Enter **Age Range** or **Grade Range**.

**Step 6.** - Enter an **As of Date Range**. Only students within the indicated age range sometime in this date range are included in the report. Using today's date will provide the most up to date information.



When the **Only include students with 2 or more non-Influenza/H1N1/COVID-19 vaccinations?** box is checked, students with 0 or 1 non-flu shots listed will not be included in the report.

**Step 7.** - Click **Run Report**.

## Results

**Appropriate Statistics Summary** Report shows the total number of students analyzed for the report. It will list the number and percentage of students having fully met and not having fully met the defined vaccination series. The tables list the number and percentage of students having met and not having met each of the individual vaccine groups in the defined series.

**Students Not Properly Immunized Detail** Report shows the vaccination history for each student that has not met the defined vaccination series. Report output includes which vaccine series are missing one or more doses based on the report selection criteria.

### Appropriate Statistics Summary

CT WIZ			August 04, 2021
Immunization Rates (School Version)			
Appropriate Immunizations			
School District =		DISTRICT, School =	
All, DTaP/Tdap Series Count = 4, HepB Series Count = 3, Hib Series Count = 3, MMR Series Count = 1, Polio Series Count = 3, Varicella Series Count = 1,		School Type =	
Exclude = N, Count Valid And Invalid Doses = N, Age Range = - (MONTHS) As Of 01/01/2000 - 09/04/2021, Grade From = 4, Grade Through = 15			
Total Patients	Full Data Set	Compliance Criteria Subset	
Total INACTIVE Patients	1		
Adjusted Total Patients	0		
	1		
Patients GIVEN appropriate number of doses of all indicated antigens	1 ( 100.00 )	( )	
Patients NOT GIVEN appropriate number of doses of all indicated antigens	0 ( 0.00 )	( )	
<b>Patients Given the following vaccine combinations:</b>			
Patients with at least 4 valid doses in the DTaP / TD / Tdap/Tdap vaccine series	1 ( 100.00 )	( )	
Patients with at least 3 valid doses in the Polio vaccine series	1 ( 100.00 )	( )	
Patients with at least 1 valid doses in the MMR vaccine series	1 ( 100.00 )	( )	
Patients with at least 3 valid doses in the Hib vaccine series	1 ( 100.00 )	( )	
Patients with at least 3 valid doses in the Hep B vaccine series	1 ( 100.00 )	( )	
Patients with at least 1 valid doses in the Varicella (CPOX) vaccine series	1 ( 100.00 )	( )	

### Students Not Properly Immunized Detail

CT WIZ			August 04, 2021		
Immunization Rates (School Version) - Patients					
Not Properly Immunized Detail					
School District =		School =			
All, DTaP/Tdap Series Count = 5, HepB Series Count = 3, Hib Series Count = 3, MMR Series Count = 2, Polio Series Count = 4, COVID-19 Series Count = 2,		School Type =			
Exclude = N, Count Valid And Invalid Doses = N, Age Range = - (MONTHS) As Of 01/01/2000 - 09/04/2021, Grade From = 4, Grade Through = 15					
* = indicates vaccination given on date is after the Assessment As Of From Date and not included as part of this assessment.					
<b>Primary Contact:</b>		<b>DOB</b>	<b>Remind:</b>		
<b>Mother:</b>		<b>(H):</b>	<b>(W):</b>		
<b>Default Clinic:</b>		<b>County:</b>	<b>Last: 06/06/2002</b>		
		<b>Relationship:</b>			
		<b>Father:</b>			
		<b>Other ID:</b>			
Vaccination Group	Vaccination	Dose	Given On	Given At	Reason Invalid
DTaP / TD / Tdap	DTaP, UF	1	01/09/2001 *		
	DTaP, UF	2	03/15/2001 *		
	DTaP, UF	3	05/10/2001 *		
	DTaP, UF	4	06/06/2002 *		
Polio	Polio-IPV	1	01/31/2001 *		
	Polio-IPV	2	03/15/2001 *		
	Polio-IPV	3	08/09/2001 *		
Hib	Hib, UF	1	01/09/2001 *		
	Hib, UF	2	03/15/2001 *		
	Hib, UF	3	05/10/2001 *		
	Hib, UF	4	03/07/2002 *		
Pneumococcal	PCV7	1	01/09/2001 *		
	PCV7	2	03/15/2001 *		
	PCV7	3	05/10/2001 *		
Hep B	Hep B, UF	1	11/12/2000 *		
	Hep B, UF	2	01/31/2001 *		
	Hep B, UF	3	08/09/2001 *		
MMR	MMR	1	03/07/2002 *		
Varicella (CPOX)	Varicella	1	11/13/2001 *		
Precautions / Contraindications					
Refusal Notes					
Series Missing Dose(s) DTaP / TD / Tdap, MMR, Polio, COVID-19					

# Student Reminder/Recall (School Version)

## Purpose

Results from the **Patient Reminder/Recall** report identify students who are due/overdue for vaccinations. For example, you may use this report if you need to identify students who are due/overdue for vaccinations that are required for school entry and for COVID-19 vaccination series completion.

The main **Reminder/Recall** page displays all previous **Reminder/Recall** lists created for the school listed, beginning with the most recent lists. This page allows users to create new **Reminder/Recall** lists, edit existing **Reminder/Recalls** and generate reports. Once a **Reminder/Recall** run has been created, the criteria cannot be edited. If a **Reminder/Recall** run is created in error, then it should be deleted and a new one should be created.



All criteria indicated is used inclusively to determine the students to include in the list. **Reminder/Recall** reports run overnight.

## Run the Reminder/Recall Report:

Follow these steps:

**Step 1.** - In the left-hand menu, click **Reports**.

**Step 2.** - Click **Patient Reminder/Recall (School Version)** from the **School Nurse** menu.

The school district and school fields will auto populate. If you are associated with more than one **School/School District**, then you can choose the enrolling **School/School District** from the drop-down menu.

**Step 3.** - Click **Add Reminder/Recall Run** to open the report parameters page.

**Step 4.** - Enter a **Run Name**. This is used to identify a specific **Reminder/Recall Run** on the main **Reminder/Recall** page.

**Step 5.** - Enter a **Run Schedule Date**.



**Reminder/Recall** reports can be very large depending on the selected query parameters. Scheduling the report allows it to be run during off-peak hours. This report will run overnight on the **Run Scheduled Date** indicated.

The **Run Completed Date** is a read-only field and will be system-populated once the run is complete.

**Reminder/Recall Date Range** restricts the list of students to only those students who are due or are overdue for a vaccination within these parameters as of the date the report is generated. This field is required.

**Step 6.** - Enter date range. Note: **For COVID-19 reports it is suggested in the date range to use 12/14/2020 through the date you are running the Reminder/Recall report.**

**Step 7.** - Use the filters to narrow the report results by **Age Range**, **Date of Birth Range**, or **Grade Range**. These fields restrict the list of students to only those who need or are due a vaccination within these parameters.

	<p>Either <b>Age Range</b> <u>or</u> <b>Date of Birth Range</b> is required, not both.</p> <p><b>Age Range</b> requires a Unit of Measure (UOM) of months or years. Select UOM type from the drop-down menu.</p>
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**Step 8.** - Use the filters listed under “Options To Target Students Included For Reminder/Recall” to restrict the Reminder/Recall to specific user-defined parameters. Either **Include Students Due for Vaccinations (Reminders)** or **Include Students Overdue for Vaccinations (Recalls)** must be checked. Selecting both will run the report for vaccines due now and past due. All other fields are optional.

	<p><b>Include Students Due for Vaccinations (Reminders)</b> includes students coming due for vaccinations. Students will be included if they are due for one or more vaccinations during the period specified by the minimum and maximum reminder dates.</p> <p><b>Include Students Overdue for Vaccinations (Recalls)</b> includes students who are overdue for one or more vaccinations as of the minimum reminder date (minus any offset).</p> <ul style="list-style-type: none"><li>○ Minimum Number of Days Past Due to Include. Limits recalls by indicating a minimum number of days overdue for students to be included. For example, entering “30” indicates that students must be at least 30 days overdue to be included in the Reminder/Recall. Leave blank or use 0 (zero) to include students who are overdue as of the minimum reminder date.</li><li>○ Maximum Number of Days Past Due to Include. Limit recalls by indicating a maximum number of days overdue for students to be included. For example, entering “30” indicates that students must be less than 30 days overdue to be included in the Reminder/Recall. Leave blank or use 0 (zero) to include students who are overdue as of the maximum reminder date.</li><li>○ <b>Leaving the Minimum and Maximum Number of Days Past Due blank or entering zero will yield the most results.</b></li></ul>
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**Step 9.** - Select the vaccine series to include in the **Reminder/Recall** run. Only students needing a vaccine from the selected series will be included.

	<p>The dose number field is optional and will limit results to students needing the specific vaccine series and dose required. For example, by selecting Varicella and entering a “2” in the dose field, the results will only include students needing a second dose of the Varicella vaccine. <b>Leave dose blank to include all doses in a series.</b></p>
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**Step 10.** - Click **Create**. The report will run overnight of the run schedule date.

## View results for a previously run report:

The screenshot shows a web application interface for "Patient Reminder/Recall (School V...)". At the top, there are "Cancel" and "Add Reminder/Recall Run" buttons. Below this is a "View" section with two dropdown menus for "School District" and "School". A table lists runs with columns: School District, School, Run Name, Run Schedule Date, Run Completed Date, Reminder/Recall From Date, Reminder/Recall Through Date, # of Patients In Run, and # of Patients Assessed. A single row is visible: "TEST RUN 8/4/2021" with dates 08/04/2021, 08/05/2021, 01/01/2010, 09/30/2022, 4, and 4. Below the table are buttons for "Unvaccinated Report", "Dymo Labels", "Full Extract", "Report", "Avery Labels", and "Extended Report", "Postcard". A "Reprocess" button is also present.

### Follow these steps:

**Step 1.** - If you have a long list, use the filter options to search the list of **Reminder/Recall Runs** by entering specific search criteria (e.g., **Run Name**, Run Schedule date) in the blank boxes at the top of the list, then press Enter on your keyboard.

**Step 2.** - Click the radio button next to the desired **Reminder/Recall Run**.

**Step 3.** - To view the parameters selected for this **Reminder/Recall Run**, double click on the run you wish to view, or click the **View** button.

Reprocess button allows a user to setup scheduled runs to reprocess the same reminder/recall run but with updated data. It is suggested to create a new run instead of using reprocess.

**Step 4.** - Select the corresponding button for the action desired (e.g., **Unvaccinated Report**, **Dymo Labels**, **Full Extract**, etc.). The output for each of these options is described in the following section.

## Delete a Reminder/Recall:

### Follow these steps to de-clutter your reports:

**Step 1.** - Double click the **View** button for the Reminder/Recall.

The **Student Reminder/Recall Edit** page will appear.

**Step 2.** - To delete this **Reminder/Recall**, scroll to the bottom of the page and select **Delete**.



Previously run reports can only be deleted **after 120 days** have elapsed since the report was run.

## Results

The **Student Reminder/Recall Report** provides several output options for the user. See below for a description of each option.

- **Unvaccinated Report.** Lists students that correspond to the **Reminder/Recall** criteria for the associated **Reminder/Recall** that have not returned for immunizations since **Reminder/Recall** was last generated.

The report includes name, contact information, student vaccination history, and immunization recommendations. The **Unvaccinated Report** displays as a PDF that can be printed and/or saved.

**CT WIZ**  
Unvaccinated Report  
September 20, 2021

**Reminder Criteria**

Reminder Run Name: 11TH GRADE  
Run Schedule Date: 09/14/2021  
Run Completed Date: 09/15/2021  
Reminder Date From: 12/01/2020  
Reminder Date Through: 09/14/2021  
# of Patients in Run: 2  
# of Patients Assessed: 165

Vaccine Series: COVID-19 - All

Other Criteria: Include Patients Due For Vaccinations (Reminders)? Y

School District: ABC SCHOOL DISTRICT  
School: ABC HIGH SCHOOL  
Age Range From (years): 12  
Age Range Through (years): 18  
From Grade: 11  
Through Grade: 11

School Dist: ABC SCHOOL DISTRICT  
City: FAKE, IAM  
School: ABC HIGH SCHOOL  
County: Tolland  
VFC Eligibility: COVID-19 UF (2)  
Gender: Gender

DOB: Home: Work: Cell: Email: Relationship:  
Reminder Date: 04/30/2021  
Age At Date: 16Y 6M 29D  
Most Recent Refusal:

Default Clinic: ()  
Most Recent Immunization Date: Most Recent Immunization Clinic:  
Immunization History: DTAP / TD / TDAP(12/01/2004 02/07/2005 04/05/2005 04/07/2006) POLIO(12/01/2004 02/07/2005 04/05/2005) HIB(12/01/2004 02/07/2005 10/06/2005) PNEUMOCOCCAL(12/01/2004 02/07/2005 04/05/2005 10/06/2005) HEP B(10/02/2004 12/01/2004 02/07/2005 04/05/2005) MM(01/10/2006) VARICELLA (CPDX)(04/07/2006) INFLUENZA(10/06/2005 11/07/2005) COVID-19(04/08/2021)

Page 1 of 2

**Reminder/Recall Vaccine Summary**

Vaccine	Number
COVID-19 UF	1
<b>Total Remaining Vaccinations Due:</b>	<b>1</b>
<b>Total Patients Remaining Due for Vaccinations:</b>	<b>1</b>
<b>Total Patients with New Vaccinations:</b>	<b>1</b>
<b>Total Patients Combined or Marked as Deleted:</b>	<b>0</b>
<b>Total Inactive Patients:</b>	<b>0</b>
<b>Total Patients Originally Due for Vaccinations:</b>	<b>2</b>

NOTE: Only Patients Remaining Due for Vaccinations are displayed.

- **Report.** Lists ALL students that correspond to the **Reminder/Recall** criteria for the associated **Reminder/Recall at the time of report generation**. The report includes name, contact information, student vaccination history, and immunization recommendations. The report displays as a PDF that can be printed and/or saved.
- **Extended Report.** Very similar to “**Report**” in style and content but also includes language information. The **Extended Report** displays as a PDF that can be printed and/or saved.
- **Dymo Labels.** Generate a set of address labels designed to be printed on a Dymo Label printer using Dymo address labels.
- **Avery Labels.** Generate a set of address labels designed to be printed on Avery 5160 style labels.
- **Postcard.** Formatted to print addresses on pre-printed reminder postcards.
- **Full Extract.** Opens a new browser window with the student data for the Reminder/Recall in a comma delimited format. This can then be imported into Excel for mail merge or other uses.

## Student Grade Advancement

### Purpose

This interactive page allows school users to advance students from one grade to the next. A user first searches for student with open enrollments for the school district/school specified and the grade level specified. Students can then be selected to automatically update their grade to the next level.



You must advance students in the highest grade advancing available in the school first (ex. 11<sup>th</sup> grade students advancing into 12<sup>th</sup>), then down to the lowest grade (then 10<sup>th</sup> advancing to 11<sup>th</sup> etc.). If not, you will have this year's and last year's students in the same grade.

## Run the Student Grade Advancement Report:

Follow these steps:

**Step 1.** - In the left-hand menu, click **Reports**.

**Step 2.** - Click **Student Grade Advancement** from the **School Nurse** menu.

The school district and school fields will auto populate. If you are associated with more than one **School/School District**, then you can choose the enrolling **School/School District** from the drop-down menu.

**Step 3.** - Select the current grade from the **Grade** drop-down.

**Step 4.** - Click **Search**.

Students who fit the criteria will be listed.

**Step 5.** - Select students to advance by checking the box next to the **Student ID**.



Clicking the checkbox next to Student ID will select all students. You will then be able to click on checks next to a student's Student ID to remove check marks for students that should not be advanced.

**Step 6.** - Click **Update**.

**Student Grade Advancement**

Click 'Search' to find students, select some/all students, then click the 'Update' button. i

**Select Students to Advance**

School District \*  
School \*  
Grade \*

<input type="checkbox"/>	Patient ID	Name	DOB	Last Updated	Updated By
<input checked="" type="checkbox"/>				Aug 5 2021 2:06PM	

## Results

All the students with a checked box will be advanced to the next grade when **Update** is clicked.

# Student Roster

## Purpose

The **Student Roster** report generates a list of students grouped by their school district and school, or by county.

## Run the Student Roster:

Follow these steps:

- Step 1.** - In the left-hand menu, click **Reports**.
- Step 2.** - Click **Student Roster** from the **School Nurse** menu.

The school district and school fields will auto populate. If you are associated with more than one **School/School District**, then you can choose the enrolling **School/School District** from the drop-down menu.

- Step 3.** - Select the **Grade Range**.
- Step 4.** - Leave **County of Residence** as default value of **ALL**.
- Step 5.** - Selecting an **Enrollment Open as of Date** restricts the report results to students that have an open enrollment as of the date listed.
- Step 6.** - Click **Run Report**.

## Results

Report output includes: **Student ID, Last Name, First Name, Age, Date of Birth, Enrollment Date, Un-Enrollment Date, Date of most recent FERPA consent** and **Ethnicity**. Extract includes student mailing and physical address. Summary totals are provided per school district and school.



**Note:** Date of most recent FERPA consent is not a required field in CT WiZ. You can populate this information by clicking on Education on the left-hand menu, click View, and enter the date, method, and relationship under the FERPA consent.

Name (ID)	Age	Date of Birth	Grade	Enrollment Date	Un-Enrollment Date	Most Recent FERPA Date	Ethnicity
	8M 27D			01/01/2018			Not Hispanic or Latino
	20Y 6M 5D			07/28/2021			Not Hispanic or Latino
	19Y 6M 0D			07/28/2021			
	3Y 0M 26D		10	05/08/2019			

Report Patient Totals: 4

## Students with Precautions/Contraindications

### Purpose

The **Students with Precautions/Contraindications** report generates a list of students by School District/School with selected allergy/risks or precautions/contraindications, which will only reflect what providers have **manually reported** into CT WiZ.

### Run the Patients with Precautions/Contraindications Report:

Follow these steps:

**Step 1.** - In the left-hand menu, click **Reports**.

**Step 2.** - Click **Patients with Precautions/Contraindications** from the **School Nurse** menu.

The school district and school fields will auto populate. If you are associated with more than one **School/School District**, then you can choose the enrolling **School/School District** from the drop-down menu.

**Step 3.** - Select the **Precautions/Contraindications** and click on the > to move to the **Selected Items** box.



Clicking >> will move all the items from **Precautions/Contradictions** to **Selected Items**.

**Step 4.** - Enter the **Effective Date Range**.

**Step 5.** - Click **Run Report**.